



IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Confirmation No.: 1308

1. I, Carolyn Pianin, am the inventor of the invention claimed in Application Serial Number 09/766,726, filed January 22, 2001, and entitled *Method and System for Providing Property Management Services In An On-Line Computing Environment* (hereinafter the "pending application"). I am over the age of eighteen and provide this Declaration freely and voluntarily, based upon my personal knowledge or information and belief. I am being compensated for my time spent in reviewing and signing this Declaration.
2. I, Carolyn Pianin, was hired by GECC to, among other duties, create the invention described and claimed in the present application. The technology disclosed in the present application was generally referred to at GECC as the services module of the RealWorkSpace (RWS) site. Through the services module of the RWS site, a person could access a variety of information and services relating to commercial real estate.

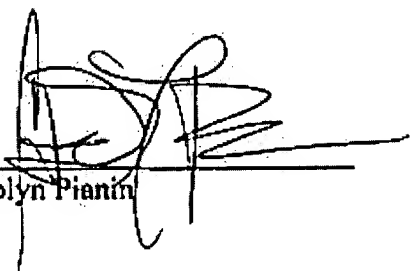
3. I, Carolyn Pianin, conceived of the invention claimed in the present patent application and actually reduced the invention to practice in the United States.
4. I conceived of the invention as claimed in the current pending patent application, Serial Number 09/766,726, prior to August 16, 2000. Attached hereto as Exhibit A is a draft of a design document entitled "Service Center Use Cases, v1.0." The Service Center Use Cases document was created at least as early as August 2, 2000, as indicated by the print date at the bottom of each page of the document.
5. As the following representative chart shows, the Service Center Use Cases, v.1.0 document describes, for example, a system and method for accomplishing the steps recited in pending Claim 20 in the application.

Claim 20	Ex. A - Services Center Use Cases, v. 1.0
20. A computer-implemented method for providing commercial real estate services via a distributed computer network, comprising:	See, e.g., p. 1, row 1.
providing a virtual marketplace to market services of a plurality of providers of commercial real estate services;	See, e.g., p. 1, row 1.
receiving, at the virtual marketplace, a request for information regarding a requested commercial real estate service available from the service providers, wherein the request comprises request criteria identifying a specific property and at least one requested commercial real estate service for the specific property;	See, e.g., p. 1, rows 3 and 4.
receiving service provider criteria from each of the service providers, the service provider criteria defining services provided by each respective service provider;	See, e.g., p. 2, row 5.
matching the request criteria with the service provider criteria of one of the service providers to identify a specific service provider that can provide the requested service; and	See, e.g., p. 2, row 5.
publishing the requested information at the virtual marketplace in response to receiving the request and based on the request criteria for the specific property, wherein the information is published as one of textual	See, e.g., p. 2, row 5.

information regarding the commercial real estate service providers and links to web sites of the commercial real estate service providers, wherein the information published in said publishing step comprises information corresponding to the specific service provider identified in said matching step.	
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6. After the preparation of the Service Center Use Cases, v.1.0 document, I continued to work diligently at reducing the claimed invention to practice. For example, attached hereto as Exhibit B is an excerpt of a Technical Design Document, Section 3.4.1 - Services Module Definition, Revision 0.3 ("Technical Design Document"). As the Technical Design Document indicates, it was created at least as early as August 18, 2000. The Technical Design Document contains additional detailed information used to reduce to practice the service component of RWS. For example, the Technical Design Document describes i) submitting a request for information regarding a service for a specific property (pages 12-13); receiving service provider criteria and matching the request criteria with the service provider criteria (pages 16-18); and publishing the requested information (pages 22-25).
7. After the preparation of the Technical Design Document, I continued to work diligently at reducing the claimed invention to practice. For example, at least as early as August 28, 2000, employees of GECC had created certain initial pages containing content for the services component of the RWS site. Examples of these initial pages containing dates of August 28, 2000 are attached hereto as Exhibit C. These initial pages illustrate options for users of RWS to request information for a variety of appraisal, engineering, and environmental services relating to commercial real estate.

8. I continued to work diligently during September of 2000 to reduce the claimed invention to practice. I reduced the claimed invention to practice at least as early as September 21, 2000. Examples of pages from the RWS site showing the features of the claimed services component are attached hereto as Exhibit D. The pages attached in Exhibit D contain the date September 21, 2000.
9. Any use of the claimed invention as shown in the attached exhibits was not a public use of the invention. ~~The work in connection with exhibits was an experimental use of the claimed invention and all work was performed either internally at GECC or under non-disclosure agreements. The claimed invention was not sold as part of any experiment.~~
10. I declare that all statements made of my own knowledge are true and that all statements made on information and belief are believed to be true. I acknowledge that willful false statements are punishable by fine or imprisonment or both under 18 U.S.C. §1001 and may jeopardize the validity of the application or any patent issuing thereon.


Carolyn Pianin

5/28/07
Date

EXHIBIT A

Services Center Use Cases

U.C. Flow #	Ref. ID #	Actor Actions	System Response
General			
1	B	1a. User selects Services	1b. System displays landing page from which the user can select one of several options: a. Speed Up Due Diligence b. Help You Save Money c. Run Your Business More Efficiently d. Quick Feature Overview
Speed Up Due Diligence			
2	B1	2a. User Selects R/E Services-Speed Up Due Diligence	2b. System displays landing page from which the user can select one of three options a. Appraisal Services b. Engineering Services c. Environmental Services
3	B1.1.1	3a. User Selects R/E Services-Speed Up Due Diligence – Appraisal Services	3b. System displays Appraisal Landing Page. a. Page includes: 1. Brief description of Appraisal process 2. Request Quote Form a. Services Needed (checkboxes) 1. Property Valuation 2. Others (text entry Box)
4	B1.1.2	4a. User selects continue	4b. System displays page 1 of Appraisal Wizard (for Property Valuation only) a. Property Details (form) 1. prop_address 2. prop_city 3. prop_state 4. prop_type 5. prop_size 6. prop_bldg_size b. Service Options (drop-down) 4c. System displays wizard navigation a. Back b. Clear c. Continue

Services Use Cases V1.0

5	B1.1.3, B1.1.3A	5a. User selects continue	<p>5b. System displays page 2 of wizard (page 1 for Services Needed-Others): list of n vendors whose profiles match the users criterion. The vendor entry includes:</p> <ol style="list-style-type: none"> Checkbox Firm name linked to company description Price Ranges (for Property Valuation only) <p>5c. System displays wizard navigation</p> <ol style="list-style-type: none"> Back New Quote Continue
6	B1.1.4	6a. User selects one or more from list	<p>6b. System checks to see if user is logged or a guest. If user is not logged in the system they will be prompted to log-in</p> <p>6c. System initiates registration Loop</p> <p>6d. System displays page 3 of wizard (page 2 for Services Needed-Others)</p> <ol style="list-style-type: none"> pre-populated contact details <ol style="list-style-type: none"> contact_name* contact_address* contact_city* contact_state* contact_zipcode contact_phone* contact_fax contact_email* (* = required fields) report requirements <ol style="list-style-type: none"> draft_report_due final_report_due <p>6e. System displays wizard navigation</p> <ol style="list-style-type: none"> Back New Quote Continue
7	B1.1.5	7a. User submits contact information	<p>7b. System displays confirmation page listing vendor firms to whom the request has been sent.</p> <p>7c. System displays Additional RWS services</p> <ol style="list-style-type: none"> Order an engineering report Order an environmental report Create a research package Create a valuation package Apply for a loan Save this property information to My Workspace

8	B1.2.1	8a. User selects R/E Services-Speed Up Due Diligence –Engineering Report	<p>8b. System displays Engineering Landing page.</p> <p>a. Page includes:</p> <ol style="list-style-type: none"> 1. Brief description 2. Select Service (checkboxes) <ol style="list-style-type: none"> a. Property Valuation b. Others <p>8c. System displays wizard navigation</p> <ol style="list-style-type: none"> a. Back b. Clear c. Continue
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9	B1.2.2	9a. User selects continue	<p>9b. System displays Request Quote Wizard.</p> <p>a. Page one of the Wizard includes:</p> <ol style="list-style-type: none"> Brief description of Engineering Services Request Quote Form <ol style="list-style-type: none"> Property Details (form) <ol style="list-style-type: none"> prop_address prop_city prop_state prop_type prop_site_size prop_bldg_size prop_type <ol style="list-style-type: none"> Industrial Multi Retail Office Other prop_yr_built prop_yr_renovated prop_parking_out_spaces prop_parking_in_spaces prop_num_tenants prop_bsmnt_occupied <ol style="list-style-type: none"> yes no Options (bank approved engineering firms) <ol style="list-style-type: none"> Option_1 Option_2 Option_3 Option_4 <p>9c. System displays wizard navigation</p> <ol style="list-style-type: none"> Back New Quote Continue
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10	B1.2.3	10a. User submits request quote	<p>10b. System displays list of n vendors whose profiles match the users criterion. The vendor entry includes:</p> <ol style="list-style-type: none"> Checkbox Firm name linked to company description Price Ranges <p>10c. System displays wizard navigation</p> <ol style="list-style-type: none"> Back New Quote Continue
11	B1.2.4	11a. User selects one or more from list	<p>11b. System checks to see if user is logged or a guest. If user is not logged in the system they will be prompted to log-in</p> <p>11c. System initiates registration Loop</p> <p>11d. System displays</p> <ol style="list-style-type: none"> pre-populated contact details <ol style="list-style-type: none"> contact_name* contact_address* contact_city* contact_state* contact_zipcode contact_phone* contact_fax contact_email* report requirements <ol style="list-style-type: none"> draft_report_due final_report_due <p>11e. System displays wizard navigation</p> <ol style="list-style-type: none"> Back New Quote Continue
12	B1.2.5	12a. User submits contact information	<p>12b. System displays confirmation page listing vendor firms to whom the request has been sent.</p> <p>12c. System displays Additional RWS services</p> <ol style="list-style-type: none"> Order an appraisal Order an environmental report Create a research package Create a valuation package Apply for a loan Save this property information to My Workspace

13	B1.3.1	13a. User selects R/E Services-Speed Up Due Diligence-Environmental Report	<p>13b. System displays Environmental Landing page.</p> <ol style="list-style-type: none"> Page includes: <ol style="list-style-type: none"> Brief description Select Service (checkboxes) <ol style="list-style-type: none"> Property Condition Others <p>13c. System displays wizard navigation</p> <ol style="list-style-type: none"> Back Clear Continue
14	B1.3.2	14a. User selects Continue	<p>14b. System displays Request Quote Wizard.</p> <ol style="list-style-type: none"> Page one of the Wizard includes: <ol style="list-style-type: none"> Property Details (form) <ol style="list-style-type: none"> prop_address* prop_city* prop_state* prop_zip* prop_site_size prop_bldg_size prop_type* <ol style="list-style-type: none"> Industrial Multi Retail Office Other <p>(* = required fields)</p> <ol style="list-style-type: none"> Options (bank approved environmental firms) <ol style="list-style-type: none"> Option_1 Option_2 Option_3 Option_4 <p>14c. System displays wizard navigation</p> <ol style="list-style-type: none"> Back New Quote Continue

15	B1.3.3	15a. User submits request quote	<p>15b. System displays list of n vendors whose profiles match the users criterion. The vendor entry includes:</p> <ul style="list-style-type: none"> a. Checkbox a. Firm name linked to company description c. Price Ranges <p>15c. System displays wizard navigation</p> <ul style="list-style-type: none"> a. Back b. New Quote c. Continue
16	B1.3.4	16a. User selects one or more from list	<p>16b. System checks to see if user is logged or a guest. If user is not logged in the system they will be prompted to log-in</p> <p>16c. System initiates registration Loop</p> <p>16d. System displays</p> <ul style="list-style-type: none"> a. pre-populated contact details <ul style="list-style-type: none"> 1. contact_name* 2. contact_address* 3. contact_city* 4. contact_state* 5. contact_zipcode 6. contact_phone* 7. contact_fax 8. contact_email* <p>(* = required fields)</p> <p>16e. System displays wizard navigation</p> <ul style="list-style-type: none"> a. Back b. New Quote c. Continue
17	B1.3.5	17a. User submits contact information	<p>17b. System displays confirmation page listing vendor firms to whom the request has been sent.</p> <p>17c. System displays Additional RWS services</p> <ul style="list-style-type: none"> a. Order an appraisal b. Order an engineering report c. Create a research package d. Create a valuation package e. Apply for a loan f. Save this property information to My Workspace
Help You Save Money			

18	B2	18a. User selects R/E Services-Help You Save Money	18. System displays list: a. Appliances b. Carpets c. Electrical Systems d. Elevator Services e. HVAC Systems f. Lighting Systems g. Risk Management h. Roofing Systems i. Title Insurance j. Water Conservation k. Waterproofing
Run Your Business More Efficiently			All links to http://www.powerbuyerservice.com
19	B3.7.1	19a. User selects R/E Services-Run Your Business More Efficiently	19. System displays list of links: a. Accounting Services b. Buy/Lease Equip c. Corporate Credit Card d. Employee Benefits e. Find Short Term Cash f. Hire Employees g. Payroll Processing
20	B3.7.1	20a. User selects R/E Services-Run Your Business More Efficiently –Employee Benefits	20b. System displays a. https://www.gesmallbusiness.com/gesmallbusiness
21	B3.2.1	21a. User selects R/E Services-Run Your Business More Efficiently –Hire Employees	21b. System displays a. http://www.jobsite.com/
22	B3.3.1	22a. User selects R/E Services-Run Your Business More Efficiently – Find Short Term Cash	22b. System displays a. https://www.gesmallbusiness.com/gesmallbusiness
23	B3.4.1	23a. User selects R/E Services-Run Your Business More Efficiently – Buy/Lease Equipment	23b. System displays a. https://www.gesmallbusiness.com/gesmallbusiness
24	B3.5.1	24a. User selects R/E Services-Run Your Business More Efficiently – Payroll Processing	24b. System displays a. https://www.gesmallbusiness.com/gesmallbusiness
25	B3.6.1	25a. User selects R/E Services-Run Your Business More Efficiently – Corporate Credit Card	25b. System displays a. https://www.gesmallbusiness.com/gesmallbusiness

26	B3.1.1	26a. User selects R/E Services-Run Your Business More Efficiently – Accounting Services	<p>26b. System displays Accounting Landing page.</p> <ul style="list-style-type: none"> a. Page includes: <ul style="list-style-type: none"> 1. Brief description 2. Select Service (checkboxes) <ul style="list-style-type: none"> a. Year end bookkeeping b. Federal/State Tax Return c. Audit d. Asset Risk management e. Others (text entry box) <p>26c. System displays wizard navigation</p> <ul style="list-style-type: none"> a. Back b. Clear c. Continue
27	B3.1.2, B3.1.3	27a. User selects continue	<p>27b. System displays Request Quote Wizard.</p> <ul style="list-style-type: none"> b. Page one of the Wizard includes: <ul style="list-style-type: none"> 1. Brief description of Accounting Service 2. Request Quote Form <ul style="list-style-type: none"> a. Property Details (for Asset Risk Assessment only) <ul style="list-style-type: none"> 1. prop_address 2. prop_city 3. prop_state 4. prop_type 5. prop_size 6. prop_bldg_size b. Company Details (for all accounting services) <ul style="list-style-type: none"> 1. company_name 2. company_employee_num 3. company_revenue_last_yr 4. company_net_last_yr 5. company_num_building_units 6. company_num_building_tenants
28	B3.1.4	28a. User submits request quote	<p>28b. System displays list of <i>n</i> vendors whose profiles match the user's criteria. The vendor entry includes:</p> <ul style="list-style-type: none"> a. Checkbox b. Firm name linked to company description c. Price Ranges

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29	B3.1.5	29a. User selects one or more from list	<p>29b. System checks to see if user is logged or a guest. If user is not logged in the system the will be prompted to log-in</p> <p>29c. System initiates registration Loop</p> <p>29d. System displays</p> <ol style="list-style-type: none"> pre-populated contact details <ol style="list-style-type: none"> contact_name* contact_address* contact_city* contact_state* contact_zipcode contact_phone* contact_fax contact_email*
30	B3.1.6, B3.1.6A	30a. User submits contact information	<p>30b. System displays confirmation page listing vendor firms to whom the request has been sent.</p> <p>30c. For Asset Risk Assessments, the system will display a list of links to other property-specific services: <ol style="list-style-type: none"> Appraisal Report Engineering Report Environmental Research Package Valuation Package Apply for a Loan Save this property information to My Workspace </p>
Quick Feature Overview			
31	B4	31a. User selects Features Overview	31b. System displays Walk-through to user (Flash – Static HTML to be created by Agency.)

– End Services Use Cases –

EXHIBIT B



Technical Design Document

Section 3.4.1. – Services Module Definition

Revision 0.3

Development of Vertical Portal Web site (www.RealWorkSpace.com)

Created
August 18, 2000

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3.4.1. Module Definitions

The services section allows the customer to find and contact a Real Estate Business Service (Appraisal, Engineering, Environmental, Accounting), get advice on legal and tax matters from an expert in the industry, and save on products and services that the end customer needs to run his business. The RWS portal will present these services catered to the real estate owner/developer. RWS will bring the same products and services common to the institutional players to the small to medium size player.



3.4.1.1 Services: Home

3.4.1.1.1 *Services-Home-Descriptive Copy*

3.4.1.1.2 *Services-Home-We Can Help*

Real Estate Services



Services You Need

You can hire an expert or get pricing information for:

- ▶ Appraisal Services
- ▶ Engineering Reports and Consulting
- ▶ Accounting Services
- ▶ Environmental Reports and Consulting

his module enables the user to obtain quotes for accounting, appraisal, engineering, and environmental services.

T

Category:	End User
Display Title:	Real Estate Services.
Module Source:	Customized.
Description:	Enables the user to obtain quotes for appraisals, accounting, engineering, and environmental services. Available for registered users only.
Personalization by User:	None.
Personalization by Admin:	None.
Programmer Info:	Can be implemented with the Links Building Block Module.
Database Tables:	None
Other Persistent Data:	None.
Form Requirements:	None.



Vendor Payment Method: None

Interactions with other modules: None.

Source of Content: Website

Content Format: HTML/JSP

Content Extraction Method: HTTP

Security Requirements: None.

Content Archival: None

Ask the Expert



Timely Advice

You can post a question on Real Workspace's "Ask the Expert" message board for:

▸ [Legal Advice](#)

▸ [Tax Advice](#)
(EOY Model)

▸ [Accounting](#)
(Motley Pool Model)

Category: End User

Display Title: Ask The Expert.

Module Source: Customized.

**Description:**

The Ask the Expert module offers two functional models for RWS users to obtain professional answers to specific business questions.

- In the first model, users can post accounting and legal questions to a subject-specific moderated discussion board where a professional from an accounting / legal firm can respond and offer advice or hints at no charge to the user.
- In the second model, users can link to a Big 5 accounting firm tax site and obtain in-depth tax advice for a fee.

Both models will be provided through a co-branded relationship that will display the vendor's site and information within the appropriate module.

The Ask the Expert module provides access to the following modules:

- Accounting Advice (based on first model)
- Legal Advice (based on first model)
- Tax Advice (based on second model)

Personalization by User: None.

Personalization by Admin:

- Change the image
- Add additional links.

Programmer Info: This module may be implemented with the Links Building Block Module.

Database Tables: None

Other Persistent Data: None.

Form Requirements: None.

Vendor Payment Method: None

Interactions with other modules: Navigation Bar module (?).

Source of Content: Website

Content Format: HTML/JSP

Content Extraction Method: HTTP



Security Requirements: None.
Content Archival: None



3.4.1.2 Services: Speed Up Due Diligence Landing Page

3.4.1.2.1 Service-Due Diligence-Descriptive Copy

3.4.1.2.2 Service-Due Diligence-We Can Help

3.4.1.3 Services: Speed Up Due Diligence – Appraisal – Select Services

The Select Appraisal Services page includes the following components:

Description of Appraisal Services

Hyperlinks to Charter Member Information Pages

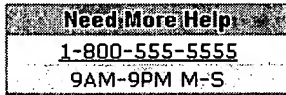
Appraisal Services Checkbox

Back/Clear/Continue Buttons

3.4.1.3.1 Services-Appraisal-Select Services-Descriptive Copy

Static descriptive text of Appraisal Services and how they may be of value to the user. This section is read-only and requires no user interaction.

3.4.1.3.2 Services-Appraisal-Select Services-Select Appraisal Services



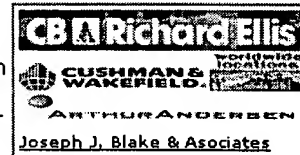
Overview

STEP
1 2 3

Welcome to Business Services!

► Real Workspace offers access to some of the most well respected, nationally recognized appraisers. Click on the icons to read more about our charter members' products and services.

► If you are talking to a lender about refinancing or obtaining a new loan, they are likely to hire an appraiser, an engineering and an environmental firm to analyze your property. Check out our charter member firms to get an estimate of what it will cost you. (because, you pay for it.)



► If you are buying a property, don't forget a property valuation, an engineering report and your phase I. Check out pricing and expertise from our charter members.

Continue >

Category: End User
Display Title: Appraisal Services
Module Source: Customized



Description:	<p>The Appraisal Services module enables a registered user to obtain a Property Valuation Report from an Appraiser. Unregistered user can only access the Overview view. Through this module, the user first enters basic information about the property that he or she wishes to have appraised. Next, RWS generate soft quotes / estimates for obtaining a Property Valuation from various vendors, based on specific information previously collected from those vendors. The user can then select one or more vendors and generate an email to those firms to request a firm quote and contract. The Appraisers will then contact the user directly via email and/or standard mail to provide those services.</p> <p>Users must proceed through the Appraisal Review in sequence and follow these steps in order, as each subsequent view will require information entered on previous views.</p> <p>The Appraisal Services module consists of the following views:</p> <ul style="list-style-type: none">Select Appraisal ServicesGenerate Soft QuoteSelect Service FirmsContact DetailsConfirmation
Personalization by User:	<p>The user may interact with the module in the following areas:</p> <ul style="list-style-type: none">Submit quote requestSelect desired vendorsSubmit user contact information
Personalization by Admin:	<p>The administrator may interact with the module in the following areas:</p> <ul style="list-style-type: none">Specify the URL for the Advertisement banner
Programmer Info:	<p>Need to persist data in MetaStore if transaction is interrupted.</p>
Database Tables:	<p>Table for vendor information (name, email, etc.)</p>
Other Persistent Data:	<p>For each view, the information entered by the user will be stored in MetaStore once the "Continue" button is clicked. This information can be used to populate the forms if the user is disconnected during the transaction.</p> <p>State information on view navigation will also be stored in MetaStore until a transaction is complete.</p>
Form Requirements:	<p>User entered form data will be stored in MetaStore if the "Continue" button of a view is clicked. This data will be cleared when the transaction is complete.</p>
Vendor Payment Method:	<p>None</p>



Interactions with other modules: None.

Source of Content: Website, database

Content Format: HTML/JSP

Content Extraction Method: HTTP, SQL

Security Requirements: User must be registered and logged on to access all views other than the Appraisal Overview view.

Content Archival: None.

View Appraisal Overview

Module: Appraisal Services Module



Description: This module consists of the following components:

- Introduction to Appraisal Services
- Hyperlinked Teasers
- Links to Paid Sponsor's Websites
- Continue Buttons

The Hyperlinked Teasers to other RWS sections provide suggestions to the user for other business services the user may find valuable.

- Hyperlinks will link the user to other business services section such as Accounting or Engineering Services.
- Clicking the hyperlink will open the appropriate RWS page in the current browser window.
- Users can always follow the breadcrumb and return to the previous location by using the browser's Back button.

The Links to Paid Sponsor's Websites provide access to paid advertiser information. The URL of this image can be edited via the administration view of this module.

- Ad banners or hyperlinked image maps will link the user to a co-branded website of one or more paid sponsors of the Appraisal Review section / channel.
- Clicking the banners / hyperlinks will open the co-branded website in the current browser window.
- User can return to this view by using the browser's Back button.

Personalization by User: User may begin the appraisal process by clicking "Continue >" or "STEP 1".

Programmer Info: None

Database Tables: None

Other Persistent Data: State information of this view will be saved in MetaStore when the "Continue >" button is clicked. This information will be cleared when the appraisal transaction is completed or canceled by the user.

Form Requirements: Set "current step" to 0.



Vendor Payment Method: None

Interactions with other view: Brings up the Request Quote module view if the “Continue >” button or “Step 1” button is clicked.

Source of Content: Website

Content Format: HTML/JSP

Content Extraction Method: HTTP

Security Requirements: None. This view can be access by all users.

Content Archival: None.

3.4.1.4 Services: Speed Up Due Diligence-Appraisal-Generate Soft Quote For Property Valuation-Step 1

3.4.1.4.1 Services-Appraisal-Valuation-Descriptive Copy

3.4.1.4.2 Services-Appraisal- Valuation -Step Wizard 1 of 3

View Generate Soft Quote

Module: Appraisal Services Module

**Description:**

The Generate Soft Quote view allows the user to enter property information and request RWS to generate a cost estimate / soft quote for a Property Valuation based on parameters provided by Appraisal vendors.

Only registered users who are logged into the system can access the Generate Soft Quote view. If a user who is unregistered or not logged in accesses this view, the module will ask the user to either register or log in and will provide the appropriate links or mechanism to do so.

The Generate Soft Quote page includes the following components:

- Services Needed
- Property Details
- Options
- Clear / Continue Buttons

Personalization by User:

Clicking "Get a Quote >" or "STEP 2" to submit the request. Clicking "Reset" to clear the form. Use the "Back" button of the browser to go back to the previous location.

Programmer Info:

None

Database Tables:

Lender information

Other Persistent Data:

State information of this view will be saved in MetaStore when the "Continue >" button is clicked. This information will be cleared when the appraisal transaction is completed or canceled by the user.

**Form
Requirements:**

Set "current step" to 1.

Validate the following form fields:

1. **Services Needed** enables the user to select a Property Valuation Repo or other appraisal service the user is interested in.

- For Gen-1, only the Property Valuation Report will be available and this field will be automatically selected.
- Users may select one or more reports / services using a checkbox feature or other similar selection method.
- Users must select at least report / service before clicking the Continue button at the bottom of the view to proceed.

2. **Property Details** allows the user to enter property specific to obtain an accurate soft quote / estimate.

- **Street Address 1** is a user-entered field for entering the primary street address where the property is located.
 - Allowable values are any alphanumeric or extended ASCII character.
 - This field is REQUIRED and will be visibly identified as such.
- **Street Address 2** is a user-entered field for entering secondary address information of the property, such as suite or floor number.
 - Allowable values are any alphanumeric or extended ASCII character.
 - This field is optional.
- **City** is a user-entered field for entering the city where the property is located.
 - Allowable values are any alphanumeric or extended ASCII character.
 - This field is REQUIRED and will be visibly identified as such.
- **State** is a user-selected field for entering the state.
 - Values are obtained from a pull-down list maintained by the system.
 - The default is a blank / empty string.
 - This field is REQUIRED and will be visibly identified as such.
- **Zip Code** is a user-entered field for entering the property's zip code.
 - Allowable values are any integer from 0 to 9; field length is 5 characters.
 - This field is REQUIRED and will be visibly identified as such.
- **Property Type** is a user-selected field for entering the proper



Vendor Payment Method:	None
Interactions with other view:	Brings up the Select Appraisal Firm module view if the "Get a quote >" or "Step 2" button is clicked.
Source of Content:	Website
Content Format:	HTML/JSP
Content Extraction Method:	HTTP
Security Requirements:	This view is for registered user only.
Content Archival:	None.

3.4.1.4.3 Services-Appraisal- Valuation -Enter Property Details

View	Provide Contact Details
Module:	Appraisal Services Module
Description:	<p>To complete the request for a firm quote and contract from the Appraisal vendors, the user will enter contact information into the following fields on the Provide Contact Details view:</p> <ul style="list-style-type: none">• Name• Address• Street Address 1• Street Address 2• City• State• Zip Code• Phone• Fax• Email Address• Report Requested By

Personalization by User:	User enters contact information.
---------------------------------	----------------------------------



Programmer Info: Set "current step" to 3.

Database Tables: Lender information

Other Persistent Data: State information of this view will be saved in MetaStore when the "Continue >" button is clicked. This information will be cleared when the appraisal transaction is completed or canceled by the user.

**Form
Requirements:**

The following fields will be validated:

1. **Name** is a user-entered field for entering the name of the person who should receive the firm quote and contract from the Appraisal vendors.
 - Allowable values are any alphanumeric or extended ASCII character.
 - This field is **REQUIRED** and will be visually identified as such.
1. **Street Address 1** is a user-entered field for entering the primary street address where the vendors should send the firm quote and contract.
 - Allowable values are any alphanumeric or extended ASCII character.
 - This field is **REQUIRED** and will be visibly identified as such
1. **Street Address 2** is a user-entered field for entering secondary address information, such as suite or floor number.
 - Allowable values are any alphanumeric or extended ASCII character.
 - This field is optional.
1. **City** is a user-entered field for entering the city of the contact person.
 - Allowable values are any alphanumeric or extended ASCII character.
 - This field is **REQUIRED** and will be visibly identified as such
5. **State** is a user-selected field for entering the contact person's state.
 - Values are obtained from a pull-down list maintained by the system.
 - The default is a blank / empty string.
 - This field is **REQUIRED** and will be visibly identified as such
6. **Zip Code** is a user-entered field for entering the contact person's zip code.
 - Maximum field length is 5 characters.
 - This field is **REQUIRED** and will be visibly identified as such
7. **Phone** is a user-entered field for entering the contact person's area code and phone number, should the vendor have questions or



Vendor Payment Method:	None
Interactions with other view:	<p>Clicking the "STEP 2" button will return the user to the Select Appraisal Firm view, or "STEP 1" to the Appraisal Overview view.</p> <p>Clicking the New Quote button will return the user to the Generate Soft Quote page. All fields will be cleared so the user may request another soft quote.</p> <p>Clicking the Continue (Submit Request) button will submit the user's request to the selected vendors and open the Confirmation page.</p>
Source of Content:	Website, database
Content Format:	HTML/JSP
Content Extraction Method:	HTTP, SQL
Security Requirements:	This view is for registered user only.
Content Archival:	None.

3.4.1.4.4 Services-Appraisal- Valuation -Filtering Options

3.4.1.5 Services: Speed Up Due Diligence-Appraisal-Generate Soft Quote For Property Validation-Vendor List-Step 2

3.4.1.5.1 Services-Appraisal-Validation-Vendor List-Descriptive Copy

3.4.1.5.2 Services-Appraisal-Validation-Vendor List-Step Wizard 2 of 3

3.4.1.5.3 Services-Appraisal-Validation-Vendor List-Vendor Listing



Select Firm

STEP

1 2 3

Select	Vendor name	Price range
<input type="checkbox"/>	<u>CB Richard Ellis</u>	\$2,000 - \$3,000
<input type="checkbox"/>	<u>Cushman & Wakefield</u>	\$4,000 - \$5,000
<input type="checkbox"/>	<u>Arthur Andersen</u>	\$2,500 - \$3,500
<input type="checkbox"/>	<u>Joseph J. Blake & Associates</u>	\$7,000 - \$8,000
<input type="checkbox"/>	<u>Vendor 5</u>	\$1,000 - \$2,000

< New Search

Submit >

View

Select Appraisal Firm

Module:

Appraisal Services Module



Description: Once the user clicks the Continue (Get Quote) button on the Generate Soft Quote view, the module will evaluate the user's inputs and dynamically generate the Select Appraisal Firm view and the vendor table by querying the lender database.

By default, the vendor table is generated in alphabetical order by Vendor Name. The user can click on a table head to sort the list in ascending order on that table head, and a second time to sort them in descending order. For example, if the user wants to sort the list by price, he or she would click on the Estimated Price table head once to sort from lowest to highest price, and a second time to sort them from highest to lowest price.

The Select Appraisal Firm view includes the following components:

- Select Checkbox
- Vendor Name
- Estimated Price
- New Quote / Continue Buttons

Select Checkbox enables the user to select which vendors he or she would like to receive a firm quote and contract from.

Vendor Name provides a list of the appraisal vendors that can provide services to the user, based on the inputs the user and vendor has provided.

- Vendor names are hyperlinked. Clicking on the link will open an Appraisal Firm information page in another reduced size browser instance. No browser navigation features or URL address window will be available.

Estimated Price provides the estimated price for a Property Valuation Report or other appraisal service, based on the user's input and cost information previously supplied by the vendors.

Personalization by User: User selects vendors from list to get additional information.

Programmer Info: Set "current step" to 2.

Database Tables: Lender information

Other Persistent Data: State information of this view will be saved in MetaStore when the "Continue >" button is clicked. This information will be cleared when the appraisal transaction is completed or canceled by the user.



Form Requirements:	None.
Vendor Payment Method:	TBD → vendors and estimated price info
Interactions with other view:	<p>Clicking “Continue >” or “STEP 3” to confirm vendor selections and provide user contact information.</p> <p>Clicking “New Quote” or “STEP 1” to go back to the Get Soft Quote view. All fields will be cleared so the user may request another soft quote.</p>
Source of Content:	Website, database
Content Format:	HTML/JSP
Content Extraction Method:	HTTP, SQL
Security Requirements:	This view is for registered user only.
Content Archival:	None.

3.4.1.6 Services: Speed Up Due Diligence-Appraisal-Generate Soft Quote For Property Valuation-Vendor List

3.4.1.6.1 Services-Appraisal-Valuation-Vendor List-Descriptive Copy

3.4.1.6.2 Services-Appraisal-Valuation-Vendor List-Vendor Listing

3.4.1.7 Services: Speed Up Due Diligence-Appraisal-Generate Soft Quote For Property Validation-Contact Details-Step 3

3.4.1.7.1 Services-Appraisal-Validation-Contact Details-Descriptive Copy

3.4.1.7.2 Services-Appraisal-Validation-Contact Details-Step Wizard 3 of 3

**3.4.1.7.3 Services-Appraisal-Validation-Contact Details-Mailing****3.4.1.7.4 Services-Appraisal-Validation-Contact Details-Report Requirements****3.4.1.8 Services: Speed Up Due Diligence-Appraisal-Generate Soft Quote For Property Validation-Confirmation Page****3.4.1.8.1 Services-Appraisal-Validation-Confirmation Page-Descriptive Copy****3.4.1.8.2 Services-Appraisal-Validation-Confirmation Page-Confirmation Message****3.4.1.8.3 Services-Appraisal-Validation-Confirmation Page- Services**

<TBD: the look and feel of the Confirmation View is unavailable.>

View	Confirmation
Module:	Appraisal Services Module
Description:	<p>Once the user clicks the Continue (Submit Request) button, the Appraisal Services module will automatically submit the user's request via email to the selected vendors.</p> <p>Each vendor will provide 1 main and 2 alternate email addresses where the request should be sent. The module will automatically send the copies with no further user intervention. It will also automatically send a blind carbon copy of every firm quote request to a dedicated email address implemented for tracking and managing the Appraisal Review process.</p> <p>The module will then generate a Confirmation view indicating which vendors have been sent the Appraisal quote request and thanking the user for using RWS. The Confirmation view will provide links to return other areas within the RWS site.</p>



Personalization by User:	None.
Programmer Info:	Reset "current step" to 0. Clear all user entered information saved in MetaStore during this transaction.
Database Tables:	Vendor information
Other Persistent Data:	None.
Form Requirements:	None
Vendor Payment Method:	None
Interactions with other view:	None
Source of Content:	Website, database
Content Format:	HTML/JSP
Content Extraction Method:	HTTP, SQL
Security Requirements:	This view is for registered user only.
Content Archival:	None.

Module Deviation from Original Requirements

1. Since this is a portal module, one cannot use the BACK button of the browser to navigate between views. Navigation between views must be done via a button that is managed by the module itself (e.g., the "Get a quote" button).

Module Issues, Questions, and Thoughts


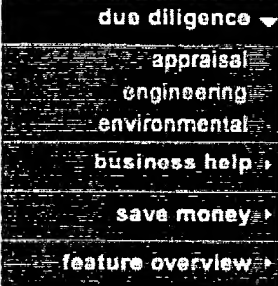


1. On pp. 1 and 2 in the Fulfillment document, the following user roles interface with the Fulfillment services:

Brokers, buyers, dealmakers/entrepreneurs/owners, office administrators, property managers, sellers, and service providers.

Does this mean we need to set these "roles" up in group manager? Or is this just the way any user will interact with the module?

2. What is a Property Valuation Report? Who creates it (vendor)? How does the user get it (vendor emails to user)? How does the user view it?

EXHIBIT C



Due Diligence Services


We Can Help You Speed Up Due Diligence

- [Appraisal Services](#)
- [Engineering Services](#)
- [Environmental Services](#)

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feedback
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appraisal
engineering
environmental
business help ▸
save money ▸
feature overview ▸

Select Appraisal Service

with charter Member Icons/Logos

Select Appraisal Services:

- Ad Valorem Tax Appraisals
- Feasibility Studies
- Financial Reporting Valuations
- Highest and Best Use
- Impact Analysis
- Insurance Placement
- Insurance Replacement Cost Studies
- Other

◀ back ▶ clear ▶ continue

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Select Engineering Service

Select Engineering Services

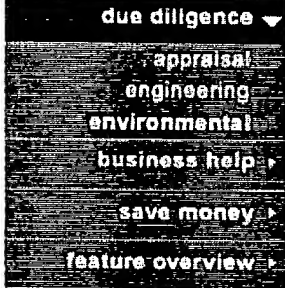
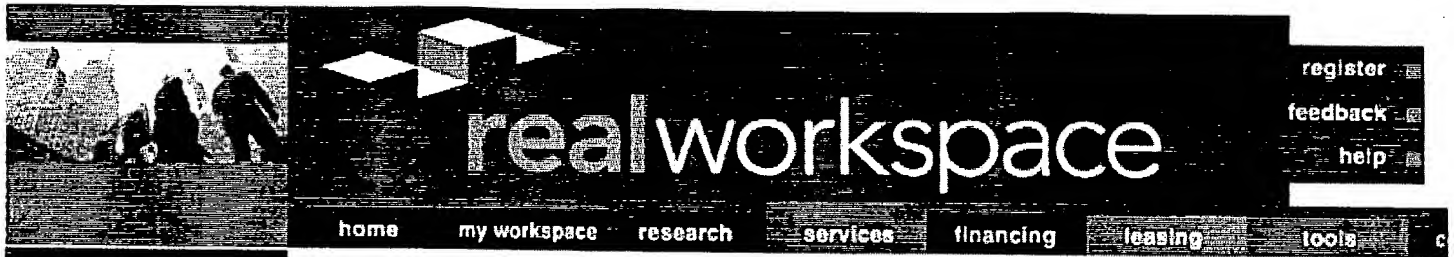
- ADA Compliance Reviews
- Building Forensic Studies
- Construction Monitoring
- Design/Build and Construction
- Detailed Design Engineering
- Engineering Desktop Review
- Estimating
- Feasibility Studies
- Physical Needs Assessments
- Process Engineering
- Reserve Analysis
- Seismic Study Reports
- Other

back clear continue

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Select Environmental Service

Select Environmental Services

Phase I/FNMA/FHLMC Protocol Environmental Assessment

Phase II Services

Asbestos Assessment
Lead-Based Paint Assessment
UST Management
Ground Water Surveys
Soil Management
Operations and Maintenance Programs

Phase III Services (Remediation)

Asbestos Screen
Lead -Based Paint Screen
Transaction Screen (ASTM E-1528)
Governmental Records Search and Interpretation
Report Review and Opinion

Other

◀ back

▶ clear



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EXHIBIT D



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business help ▸
save money ▸
feature overview ▸

Select Appraisal Service

Select Appraisal Services:

Property Valuation Report

Ad Valorem Tax Appraisals
Feasibility Studies
Financial Reporting Valuations
Highest and Best Use
Impact Analysis
Insurance Placement
Insurance Replacement Cost Studies
Other

Select State that Service is to be performed in:

◀ back

▶ clear

▶ continue



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http://www.testrws.com/services/services_due_appraisal_g1.html

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engineering
environmental
business help ▸
save money ▸
feature overview ▸

Quote for Property Valuation - Step 1

Step wizard 1 of 3

Enter Property Details

*Street Address 1

Street Address 2

*City, *State ,

*Zip Code

*property type

Site Size

*Building Size

* = required fields

◀ back

▶ clear

▶ continue



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http://www.testrws.com/services/services_due_appraisal_gen_step1_g1.html

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Due Diligence Services

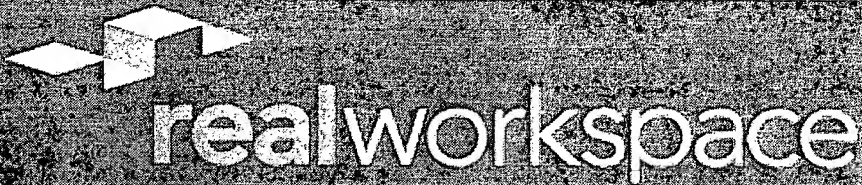
We Can Help You Speed Up Due Diligence

- [Appraisal Services](#)
- [Engineering Services](#)
- [Environmental Services](#)

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engineering
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save money ▸
feature overview ▸

Quote for Property Valuation - Vendor List

Step wizard 2 of 3


Select	Vendor name	Price range
<input type="checkbox"/>	<u>Joseph J. Blake & Associates</u>	\$7,000 - \$8,000
<input type="checkbox"/>	<u>American Appraisal</u>	\$1,000 - \$2,000
<input type="checkbox"/>	<u>Koeppel Tener Real Estate Services</u>	\$1,000 - \$2,000

◀ back ▶ new quote ▶ continue

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 environmental
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feature overview

Quote for Property Valuation - Contact Details - Step 3

Step wizard 3 of 3
Enter Contact Details

*Name

*Street Address 1

*Street Address 2

*City, *State ,

Zip Code

*Phone

Fax

*E-mail

*= required fields

Report Requirements:


Draft By:

Final By:

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save money ▸
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Select Engineering Service

Select Engineering Services

Property Condition Report

ADA Compliance Reviews
Building Forensic Studies
Construction Monitoring
Design/Build and Construction
Detailed Design Engineering
Engineering Desktop Review
Estimating
Feasibility Studies
Physical Needs Assessments
Process Engineering
Reserve Analysis
Seismic Study Reports
Other

Select State that Service is to be performed in:

◀ back

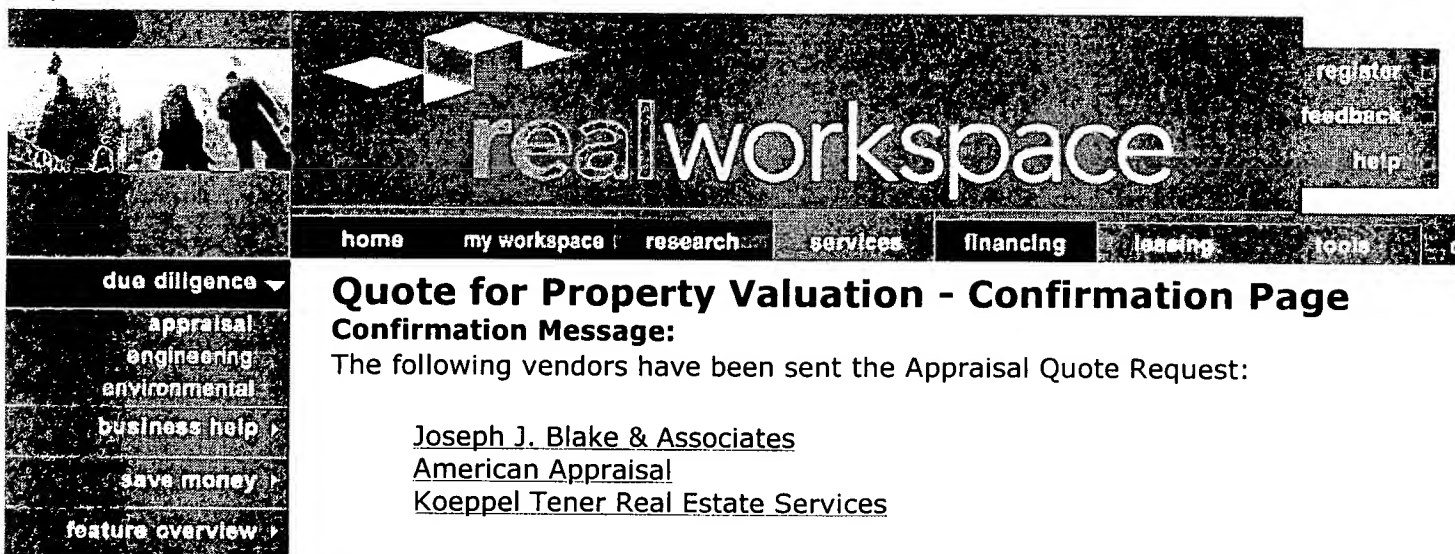
▶ clear

▶ continue

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Quote for Property Valuation - Confirmation Page

Confirmation Message:

The following vendors have been sent the Appraisal Quote Request:

[Joseph J. Blake & Associates](#)

[American Appraisal](#)

[Koeppel Tener Real Estate Services](#)

Thank you! for using Realworkspace.

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Quote for Property Condition Report - Step 1

Step wizard 1 of 3

Enter Property Details

*Street Address 1	<input type="text" value="3 Bethesda Metro"/>		
Street address 2	<input type="text"/>		
*City, *State	<input type="text" value="Bethesda"/>	<input type="text" value="MD"/>	
*Zip Code	<input type="text" value="20814"/>		
*property type	<input type="text" value="Office"/>		
*Site Size	<input type="text" value="1 - 5 acres"/>		
*Building Size	<input type="text" value="50,001 -100,000 Sq Ft"/>		
*Age	<input type="text" value="15"/>		
Year Built	<input type="text" value="1985"/>		
Year Last Renovated	<input type="text" value="1996"/>		
Number of outside parking	<input type="text" value="2500"/>		
Number parking in garage	<input type="text" value="1750"/>		
Number of Buildings on Site	<input type="text" value="2"/>		
Occupancy	<input type="text" value="83%"/>	Basement Occupied	<input type="text" value="Yes"/>

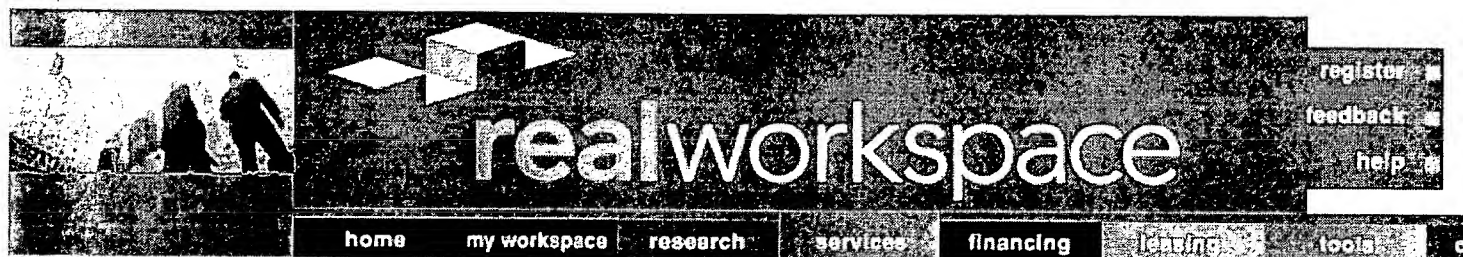
* = required fields

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The header features the Realworkspace logo with a stylized 'r' and 'w' icon. To the right of the logo are links for 'register', 'feedback', and 'help'. Below the logo is a horizontal navigation bar with links: 'home', 'my workspace', 'research', 'services', 'financing', 'lending', and 'tools'. On the left side of the header is a vertical menu with links: 'due diligence', 'appraisal', 'engineering', 'environmental', 'business help', 'save money', and 'feature overview'. The main content area is titled 'Quote for Property Condition Report - Step 2' and 'Step wizard 2 of 3'. It contains a table with two columns: 'Select' and 'Price range'. The table lists two vendors: 'EMG' with a price range of '\$2,000 - \$3,000' and 'Vertex' with a price range of '\$4,000 - \$5,000'. Below the table are three buttons: 'back', 'new quote', and 'continue'.


Select	Vendor name	Price range
EMG		\$2,000 - \$3,000
Vertex		\$4,000 - \$5,000

[back](#) [new quote](#) [continue](#)

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Quote for Property Condition Report - Step 3

Step wizard 3 of 3

Enter Contact Details

*Name

*Street Address 1

*Street Address 2

*City, *State

Zip Code

*Phone

Fax

*E-mail

* = required fields

Report Requirements:

Draft By:

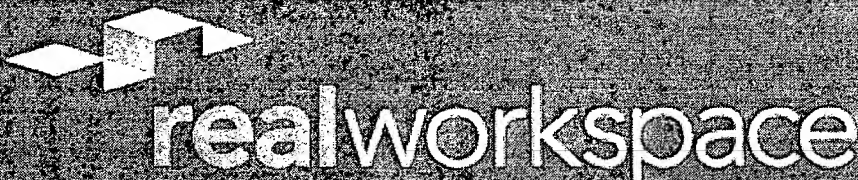
Final By:

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appraisal
engineering
environmental
business help ▸
save money ▸
feature overview ▸

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Quote for Property Condition Report - Confirmation Page

Confirmation Message:
The following vendors have been sent the Engineering Quote Request:

EMG James & Moore Metcalf
Vertex

Thank you! for using Realworkspace.

Did you know you can also use Realworkspace to:

Order an Appraisal Report

Order an Asset Risk Assessment Accounting Report

Order an Environmental Report

Create a Research Package

Create a Valuation Package

Apply for a loan

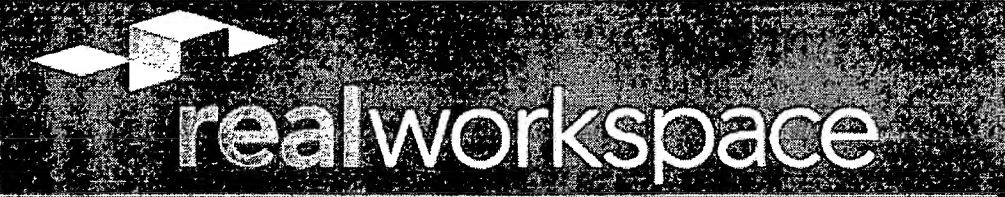
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Select Environmental Service

Select Environmental Services

- ▶ Phase I
 - FNMA/FHLMC Protocol Environmental Assessment
- ▶ Phase II Services
 - Asbestos Assessment
 - Lead-Based Paint Assessment
 - UST Management
 - Ground Water Surveys
 - Soil Management
 - Operations and Maintenance Programs
- ▶ Phase III Services (Remediation)
 - Asbestos Screen
 - Lead -Based Paint Screen
 - Transaction Screen (ASTM E-1528)
 - Governmental Records Search and Interpretation
 - Report Review and Opinion
 - Other


Select State that Service is to be performed in:

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[due diligence](#) [appraisal](#) [engineering](#) [environmental](#) [business help](#) [save money](#) [feature overview](#)

Quote for Phase I Report - Step 1

Step wizard 1 of 3

Enter Property Details

*Street Address 1

3 Bethesda Metro

Street address 2

*City, *State

Bethesda, MD

*Zip Code

20814

*property type

Office

*Site Size

1 - 5 acres

*Building Size

50,001 -100,000 Sq Ft

*Number of Buildings

2

* = required fields

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 engineering
 environmental
business help ▶
save money ▶
feature overview ▶

Quote for Phase I Report - Vendor List - Step 2

Step wizard 2 of 3

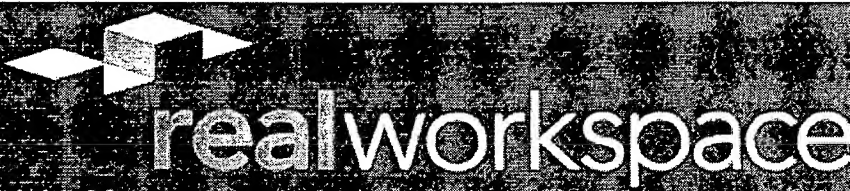
Select	Vendor name	Price range
	EMG	\$2,000 - \$3,000
	Vertex	\$1,800 - \$2,400
	Joseph J. Blake	\$1,800 - \$2,400
	Koeppel Tener Real Estate Services	\$2,800 - \$2,400

◀ back ▶ new quote ▶ continue

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Quote for Phase I Report - Contact Details - Step 3

Step wizard 3 of 3

*Name:

*Street Address 1:

Street Address 2:

*City, *State:

Zip Code:

*Phone:

Fax:

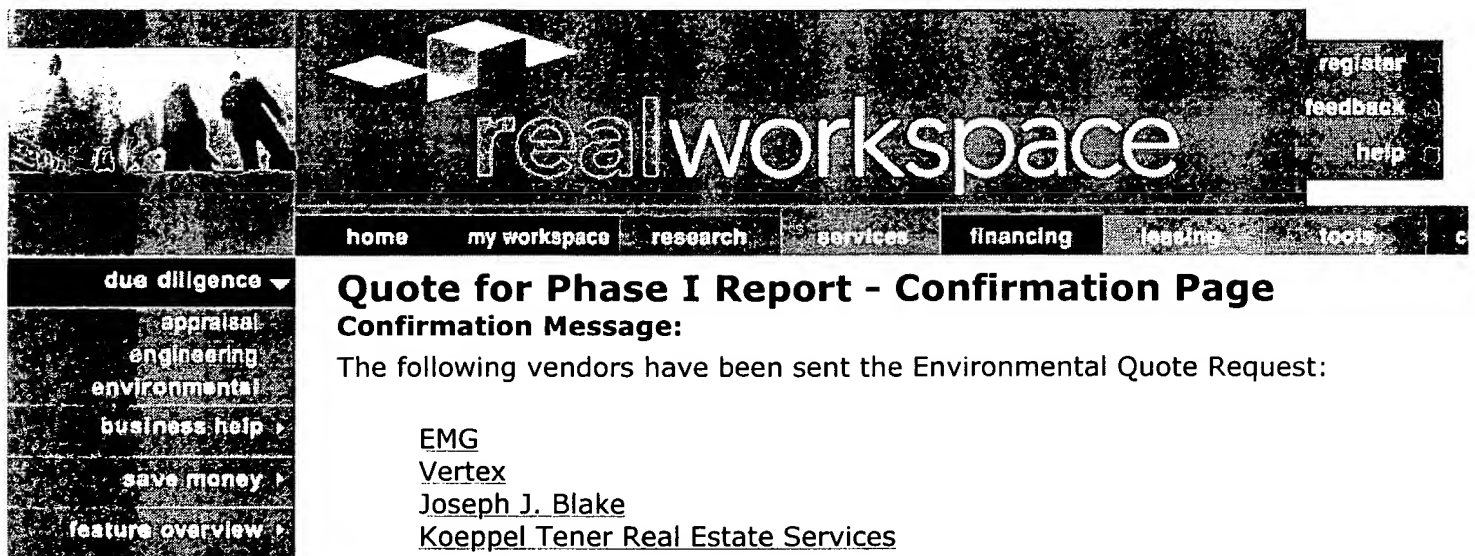
*E-mail:

* = required fields

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register
feedback
help

home my workspace research services financing leasing tools

due diligence
appraisal
engineering
environmental
business help
save money
feature overview

Quote for Phase I Report - Confirmation Page

Confirmation Message:

The following vendors have been sent the Environmental Quote Request:

EMG
Vertex
Joseph J. Blake
Koeppel Tener Real Estate Services

Thank you! for using Realworkspace.

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Order an Asset Risk Assessment Accounting Report

Order an Engineering Report

Create a Research Package

Create a Valuation Package

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